Project Management

SC Association of Government Purchasing Officials
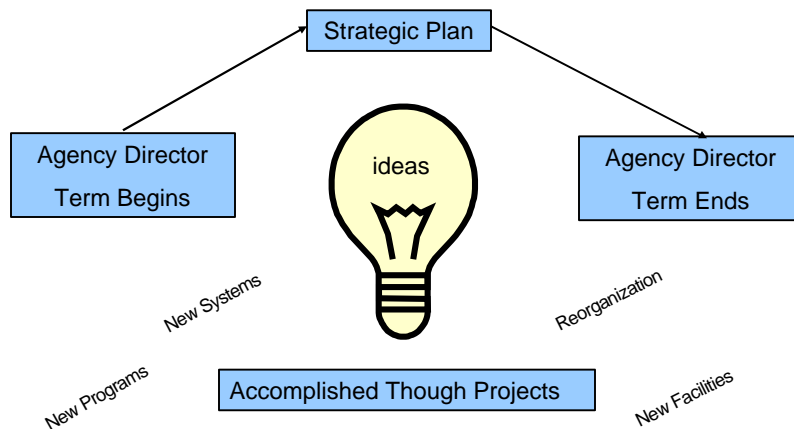**March 9, 2006**

Today's Agenda

- Why is Project Management Important
- Five Year Goals
- Accomplishments to Date (Policy)
- On-going Activities
- What's On the Horizon
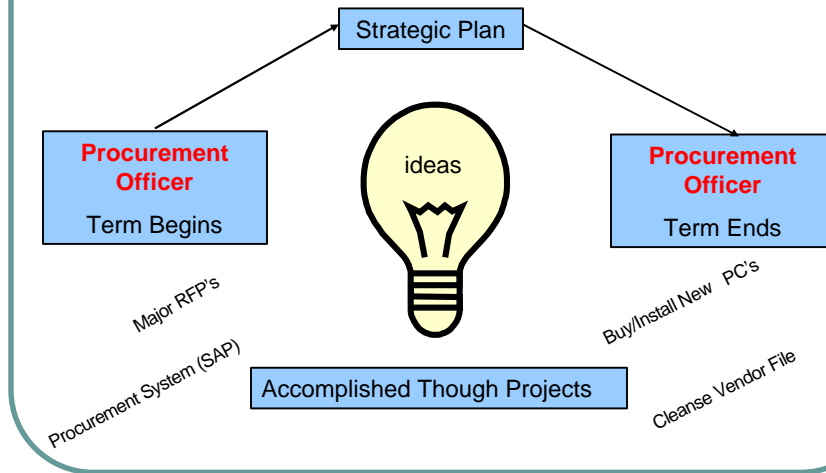- Feedback/Questions

Planning for the Future

Enthusiasm can only be aroused by two things: first, an ideal that takes the imagination by storm, and second, a definite intelligible plan for carrying that ideal into practice.

Arnold Toynbee (1889-1975)
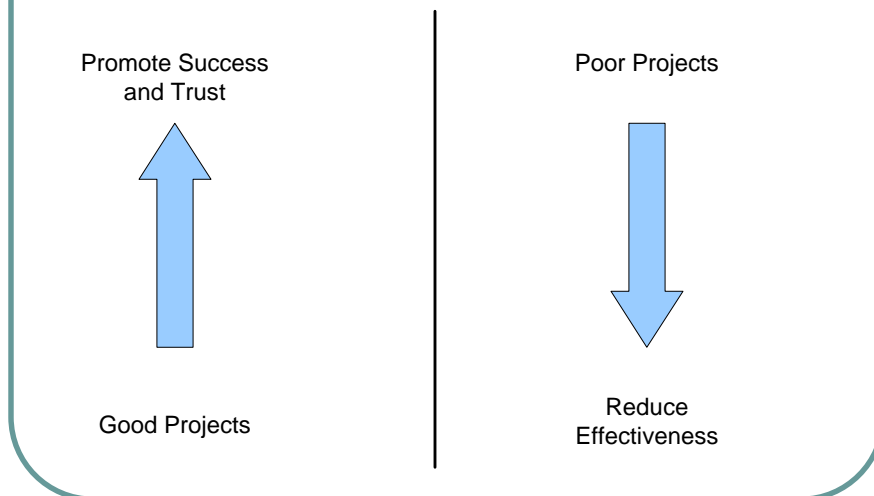**British Historian and Educator**

Why is Project Management Important

Strategic Plan

Agency Director
Term Begins

ideas

Agency Director
Term Ends

New Systems

Reorganization

New Programs

Accomplished Though Projects

New Facilities

Why is it Important to You

Strategic Plan

Procurement Officer

Term Begins

Procurement Officer

Term Ends

ideas

Major RFP's

Procurement System (SAP)

Buy/Install New PC's

Cleanse Vendor File

Accomplished Though Projects

Impact of Good Project Management

Promote Success
and Trust

Poor Projects

Good Projects

Reduce
Effectiveness

Desired Organizational Structure

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              ┌─────────────────┐
              │  Agency Director │
              └─────────────────┘
                       │
        ┌──────────────┼──────────────┐
┌───────────────┐ ┌───────────────┐ ┌───────────────────┐
│  Director of  │ │  Director of  │ │ Project Management│
│    Finance    │ │  Procurement  │ │      Office       │
└───────────────┘ └───────────────┘ └───────────────────┘
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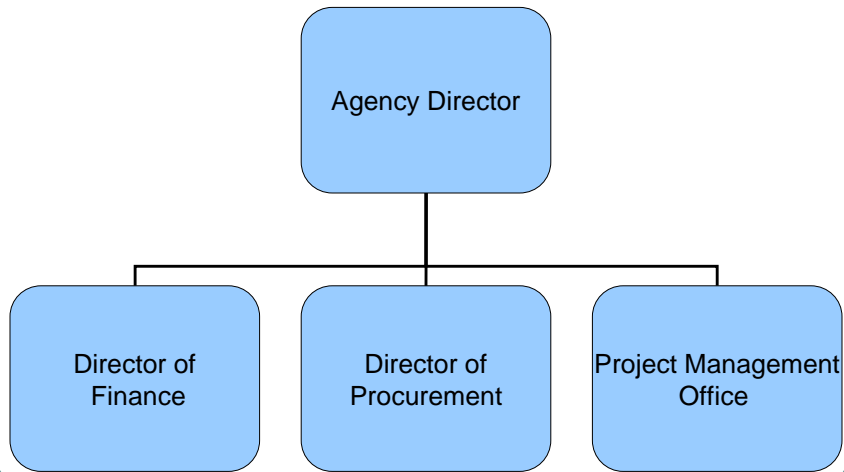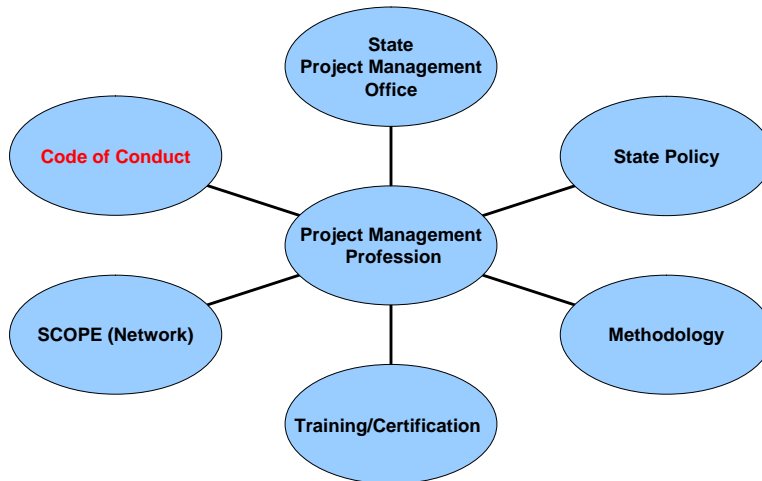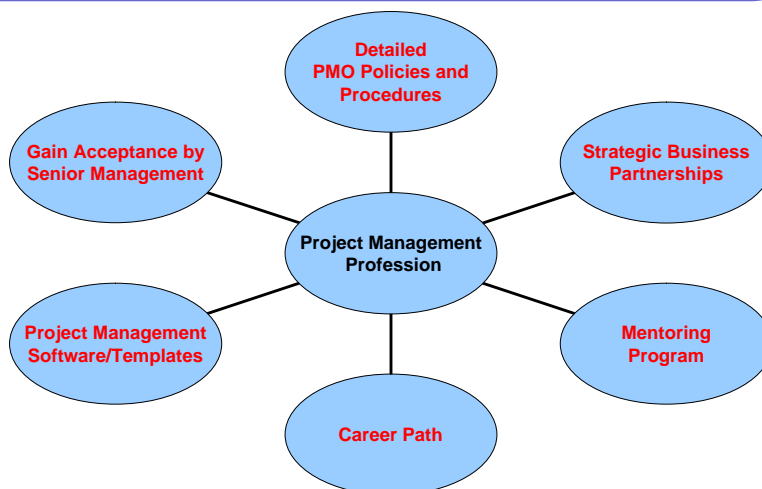
Project Management Strategic Plan

- Establish project management as a high level profession in State government
- Create a career path for project managers
- Change the culture of State government to embrace project management
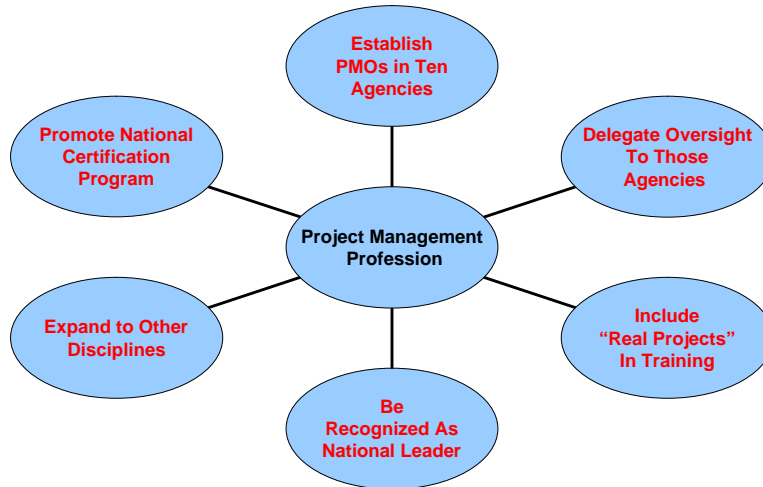- Incorporate and use project management templates in the State's business processes

Goals

Accomplishments – 2003-05

- State Project Management Office
- Code of Conduct
- State Policy
- Project Management Profession
- SCOPE (Network)
- Methodology
- Training/Certification

Plan for Immediate Future - 2006-07

- Detailed PMO Policies and Procedures
- Gain Acceptance by Senior Management
- Strategic Business Partnerships
- Project Management Profession
- Project Management Software/Templates
- Mentoring Program
- Career Path

On the Distance Horizon - 2008-09

Establish PMOs in Ten Agencies

Promote National Certification Program

Delegate Oversight To Those Agencies

Project Management Profession

Expand to Other Disciplines

Include "Real Projects" In Training

Be Recognized As National Leader

Accomplishments to Date

Policy for the Management of Technology Projects in South Carolina State Government

Purpose Statement

- Promotes the importance/value of using sound project management practices
- Requires agencies to adopt a project management methodology for use on all IT projects
- Defines projects that should be monitored through a shared relationship between the State PMO, agency and, if appropriate, the vendor
- Defines the responsibilities of the State PMO, the agency and vendor in managing IT Projects
- Establishes the effective date of the Policy as July 1, 2005

Section 1: General

Established State PMO and Administrative Requirement for Various Sizes of Technology Projects

State Project Management Office

- Director – Dell Ford, PMP, SPM
- Training Coordinator - Beverly Cummings, PMP, SPM
- Two Internal Program Managers:
  - Barbara Fletcher, PMP, SPM
  - Eric Pinckney, PMP, APM
- 8-10 PM's on Assignment:
  - Child Support, SCEIS, etc. - All PMP certified

Certifications: 10 PMP's, 2 Six Sigma's, 1 Function Point Manager, 5 Senior PM's and 1 Associate PM

Defines Four Categories of Projects

- Minor Projects (less than $50,000)
- Small Projects
- Major Projects
- Multi-Agency/Enterprise Projects

Agencies must report the status of Major and Multi-Agency/Enterprise Projects to the PMO on a monthly basis

Major Technology Projects

- Projects with a cumulative investment in technology of $1 million or more
- Projects that meet two or more of the following criteria (for smaller agencies):
  - Estimated IT investment exceeds $400,000
  - Mission critical
  - Duration exceeds twenty-four months
  - High risk (leading edge technology)
  - Has enterprise/multi-agency implications

Major Technology Projects

- Exception: Large agencies can obtain certification to independently manage projects having a cumulative investment in technology up to $5 million (criteria is being developed)

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Agency Certification – Criteria

- Project management office
- Project management policy
- Use project management software
- Have both associate and senior certified project managers
- History of successful projects
- Use an approved project management methodology
- Have a current agency and/or IT strategic plan

DRAFT

UP TO $5 MILLION

Section 4: Dashboard

The State PMO must establish a "dashboard" reporting process for Major and Multi-Agency/Enterprise Projects by July 1, 2005.

"Dashboard" Processes

- Applies to Major and Multi-Agency/Enterprise Projects
- Status reports must be submitted to the State PMO on a periodic basis
- Red, green and yellow status reporting
- Vendor must develop/provide reports in the format established by the State PMO
- State PMO will assign a project manager to coordinate with agency/vendor project manager

"Dashboard" Requirements

- Specific "dashboard" requirements can be found on the State's Project Management Web site

Requirements are in Draft and are Being Tested

Section 7: Methodology

The State PMO must develop a standard project management methodology by July 1, 2004. Each agency must adopt this or an approved methodology by July 1, 2005.

Methodology

- Project Checklist - defines requirements for the four types of project specified in the State Policy
- Methodology – includes forms, templates, checklist and standard reports
- Being used on several Major Projects
- Need agency and vendor feedback

PMO Approved Methodologies

- Two agency methodologies have been approved:
  - Department of Revenue
  - Medical University of South Carolina
- All other agencies are required to use State Methodology
- Two Vendor Methodology have been approved:
  - Tiba Solutions
  - Advanced Automation Consulting

Project Management Methodology

- Initiation
- Planning
- Execution
- Control
- Close-Out

The State's Project Management Methodology will always be fully aligned with PMI's PMBOK.

Section 8: Project Management Training

Beginning July 1, 2005, project managers are required on all Major and Multi-Agency/Enterprise Projects and they must be "certified" under a program approved or provided by the State PMO

Two Programs Have Been Approved

- PMI's Project Management Professional (PMP)

- State's Project Management Certification Program
  - Associate
  - Senior

Instructors:
Dr. John Adams
Dr. Sherry Mercer

State Certification Programs

- Associate Project Management Program
  - 15 weeks on-line training
  - State methodology and PMBOK
  - Project management basics
- Senior Project Management Program
  - Six day boot camp
  - Rescue a troubled project
  - Team dynamics
  - South Carolina specific issues/requirements

Recommended Order of Certifications

State Employees:
- Certified **Associate/Senior** State Project Manager
- PMP

Vendors:
- PMP
- Certified **Associate/Senior** State Project Manager (as space is available)

Additional Training

- Sponsor Training
- Vendor Training
- Cover South Carolina specific requirements:
  - Reporting Requirements
  - Procurement Code
  - Contract Provisions
  - Standard Methodology
  - Code of Conduct
  - Expectations/Responsibilities

Participation in Training

- Initial Senior Class was held November 2004 – 23 participants from 16 agencies and institutions
- Initial Associate Training Completed in March 2005 – 22 participants 13 agencies/institutions
- Second Senior and Associate Classes have been completed – third Associate Class is underway
- Approximately 80-90 participants have been certified through these Programs
- Established a Training Committee to assist in reviewing/revising both programs and keeping them current

Required of Our Instructors

- Challenging
- Fair
- South Carolina Specific
- Create Credibility with Senior Management
- Change the existing culture
- Participant will help determine/drive content

Other Ongoing Activities

Three Review Committees

- Develop policy and procedures manual for the State PMO
- Revise State Methodology and align with recent changes to the PMBOK
- Create a Code of Conduct for senior and associate certified project managers

Beeline Contract for PM

- Separate contract specifically for project management services
- Contract administered by ITMO
- Contain specific provisions govern the management of State projects
- Higher rates for senior, certified project managers

Beeline Contract – Cont'd

- Agree to comply with State Policy
- Complete deliverables for each project phase before proceeding to next phase
- Honesty in reporting is essential
- Must use State Project Management Methodology unless another has been approved
- Must replace project manager on a project with someone having same skills and certifications

SCOPE

- Lisa Phipps, State Retirement System is Chair
- Meets quarterly
- Provides input to the CIO
- Exchange of information and sessions on project management topics, active projects, etc.
- Approximately 40 members at this time

National PM Forum

- SC initiated and sponsored by NASCIO
- Monthly Conference Calls – 37 States
- Listserv and Web site
- PM Newsletter – in process
- Beverly Made a presentation at NASCIO conference in October in San Diego
- Goal: Determine if there is interest to establish a <u>Public Sector</u> PM Association

Implement Project Server

- Use MS Project Server of all Major and Multi-Agency/Enterprise Projects
- Establish <u>standard</u> templates for various types of technology projects
- Training completed
- Implementation and testing underway

Strategic Business Partner Program

- Use and promote the State Methodology
- Provide status reports in the State format
- Routinely employ experienced and certified PM's on State projects
- Contribute 15 hours of mentoring services to State agencies per quarter
- Support the project management profession

On the Horizon

Future Activities

- Establish a portfolio management process that spans State agencies
- Promote the establishment of PMO's in large State agencies and institutions
- Make agency directors aware of the value/benefits of project management
- Expand use of project management to other disciplines

Future Activities

- Become a recognized national leader in the use of project management
- Promote the establishment of a national association and certification program
- Establish a performance measurement program to validate the benefit of project management
- Identify senior project managers to provide CPE training on various topics

Questions